



DENTAL APPOINTMENT CHECKLIST: PREPARING FOR THE DENTAL APPOINTMENT

C H E C K L I S T

Client Name: _____

Instructions: Staff to initial each area as completed. Document any comments related to the completion of each task in the space provided. Forward or file completed checklist according to agency protocol.

Needed Medication

- _____ 1. Make sure pre-appointment medication, if necessary, is available in the home the day prior to the appointment.

Prepare and take pertinent information to the appointment

If unable to find or do not know the information—call supervisor/nurse.

- _____ 1. Name and contact information of guardian/healthcare representative
- _____ 2. Insurance cards and photo identification
- _____ 3. Medication list or copy of current Medication Administration Record (MAR) and medication history, including recent medicine changes, reason for change, and any problems.
- _____ 4. Medical/surgical/dental history; current dental X-rays, and other information related to appointment
- _____ 5. Information/questions provided by support team, including events leading up to current problem/issue
- _____ 6. Completed health care visit/consultation form with person's name and reason for the appointment written on it
- _____ 7. Contact information, directions, and parking information for the health care provider's office
- _____ 8. List of other current health care providers for the person with their contact information
- _____ 9. Name, phone, and fax number of a contact person from the provider agency, if applicable
- _____ 10. Name, location, phone, and fax number of preferred pharmacy



DENTAL APPOINTMENT CHECKLIST: PREPARING FOR THE DENTAL APPOINTMENT

C H E C K L I S T

Prepare the Individual

- ___ 1. Follow orders regarding eating or holding medication as needed.
- ___ 2. Give any necessary routine and PRN (as necessary) medication as ordered.
- ___ 3. Make sure time to have personal hygiene needs met and time to eat (if allowed) prior to the appointment. Make sure teeth are brushed.
- ___ 4. Make sure person is clean and dressed appropriately in clothing that can be easily removed if needed.
- ___ 5. Prepare snacks and drinks as needed, especially if a long distance to the appointment. Make sure teeth are brushed if snacks are eaten prior to appointment.
- ___ 6. Prepare supplies for hygiene needs such as wipes, adult undergarments, and change of clothing, toothbrush, and toothpaste.
- ___ 7. Prepare activities and items to keep occupied in the event you have to wait.
- ___ 8. Explain as appropriate what will happen during the appointment with input from the support team.
- ___ 9. Provide desensitization (reducing the likelihood of negative reaction) as needed and outlined in Behavior Support Plan (BSP).
- ___ 10. Allow travel time to prevent rushing. If running late, notify office and inform of situation, expected arrival time, and verify whether the provider can still see the individual.
- ___ 11. Arrive 10-15 minutes early particularly if first appointment, unless otherwise directed by provider's office.

It is essential that whoever accompanies the individual to the appointment knows the individual and what the appointment is for, and understands what to bring to the appointment. Notify your supervisor if you have any question regarding the upcoming appointment.

